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We simplify data to help your business grow.

Tableau to Power BI Migration

Introduction to Pomerol Partners

Pomerol is a team of talented consultants specializing in data-driven projects **focused on delivering business value.**

Pomerol's Model

1 Partner : 10 Consultants

5 Core Business Practices
We have specialized teams focused on Data Strategy, Data Analytics, Data Engineering, Data Science, and Data Products.

US-based
20+ employees and 3 Partners based in the Americas

Our Consultants

True Team
Our consulting teams collaborate to support client projects daily – this is the norm – not the exception

Employee Collaboration
Our employee secondment program leads to closer working relationships across the Americas and provides invaluable experiences for our consultants

Talent & Retention
With a true path to partnership, we help our consultants grow their individual careers. As a result, we attract and retain the most talented consultants

Our Clients

Reputation Built On Results
Our results speak for themselves: over 80% of our work is referral, recommendation or repeat business

Industry Agnostic
Our consulting teams have experience in your industry and will engineer a solution to match your business process

Client Experience
Client experience means the world to Pomerol – you will receive personalized and attentive service

Our Technology Alliances

Technology Agnostic
Outside our key data analytics technology alliances, we are technology agnostic. Our consulting teams will work with the technology that fits your strategy

Microsoft Data & AI Solutions Partner: We have delivered projects across the Microsoft data stack including Power BI, Fabric and more

Qlik (Elite) Partner
We are an Elite partner of Qlik – we hold a seat on the Global Partner's Advisory Council – and we have completed 400+ Qlik projects

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Rooted in America, Impact on a Global Level.

Our firm is Midwest-based, powered by talent across the Americas.

Denver
Scott Duthie
Partner
Data Analytics practice lead with deep technical knowledge of CRM and ERP platforms. Specializes in high-impact reporting solutions.

Chicago
John Fitzgerald
Partner
Data Engineering practice lead: Manages technology partner relationships and leads roadmap engagements. Focused on technical sales, lean management and manufacturing consulting.

Kansas City
Fred Hefer
Managing Partner
Co-founder, ex investment banking finance professional and operational leader. Responsible for company culture, business development and strategic partnerships.

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What We Do At Pomerol Partners

Pomerol builds industry-leading, business-focused data solutions. We are not general technologists; we specialize in data and data-driven projects. We provide business value to our clients through simplifying data and making data actionable.

Data Strategy

We help drive organization-wide alignment on data and analytics priorities to achieve maximum business value. Analytics TO WIN® is Pomerol's answer to crafting a practical and prescriptive Data and Analytics Strategy quickly and efficiently.

Data Engineering

We work with you to extract, cleanse, organise, curate, store, and catalog your data throughout its entire lifecycle from creation to the time it's archived using best-in-class tools like Databricks and Snowflake.

Data Analytics

Dashboards that empower data discovery and channel insights to decision makers. We automate analytic workflows, build scheduled report distribution, and embed operational alerting.

Data Science

We help you identify future outcomes and trends by layering automated machine learning models over your data landscape. Predictive analytics drives value through better planning and proactive decision making.

Data Products

We partner with you to build bespoke data driven commercial products leveraging the latest web development tools sets - Subscription based platforms, customer portals, analytic mashups in public facing websites.
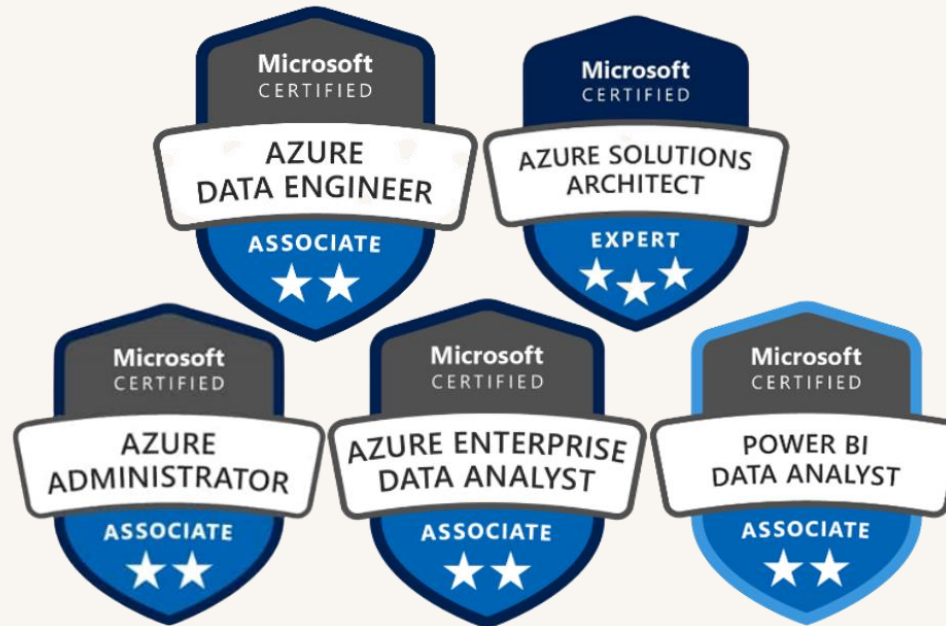
Client Success and Managed Services

CIO Advisory Services

Pomerol Partners Credibility

We are a Data & AI Solutions Partner with certifications across the Microsoft stack.

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Pomerol Partners Credibility

Our top-tier clients include:

Why Migrate to Power BI?

The top reasons our clients have given for migrating to Power BI

Lower Costs

Power BI licensing is significantly cheaper than competitors

Flexible license packages allow adaptation to your business needs

Reduce Complexity

Most enterprises use an average of 3+ different BI platforms

This leads to report overload, duplication, errors, and lack of control

Rationalizing BI delivery to a single platform (Microsoft) addresses these issues

AI Ready Platform

Bring your data into the era of AI

Reshape how everyone accesses, manages, and acts on data with a single, AI-powered platform

Adopt a data platform that's infused with AI at every layer to help you get more done, faster

Self-Service BI

Empower users to design and deploy their own reports

Cultivate Data-Driven Culture that encourages actionable knowledge sharing

Fabric

With Fabric, Power BI, Synapse, and Data Factory are unified on a single SaaS platform

Data teams can collaborate in a single workspace, on the same copy of data, with centralized administration, governance, and compliance tools

Power Platform

Suite of low-code tools that empowers organizations to streamline processes and automate tasks

Integration with Power BI enables businesses to automatically drive actions based upon insights detected in their data

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Our Migration Process

Overview

Phased Migration Approach

Phase 1 - Planning

- Rationalize scope of migration
- Produce roadmap for migration delivery

Phase 2 - Delivery

- Accelerated migration using automation tool
- Optimise architect for Power BI

Objectives

Maximize ROI - focus scope of migration to only where value is added

Automate - minimize time and costs by automating wherever possible

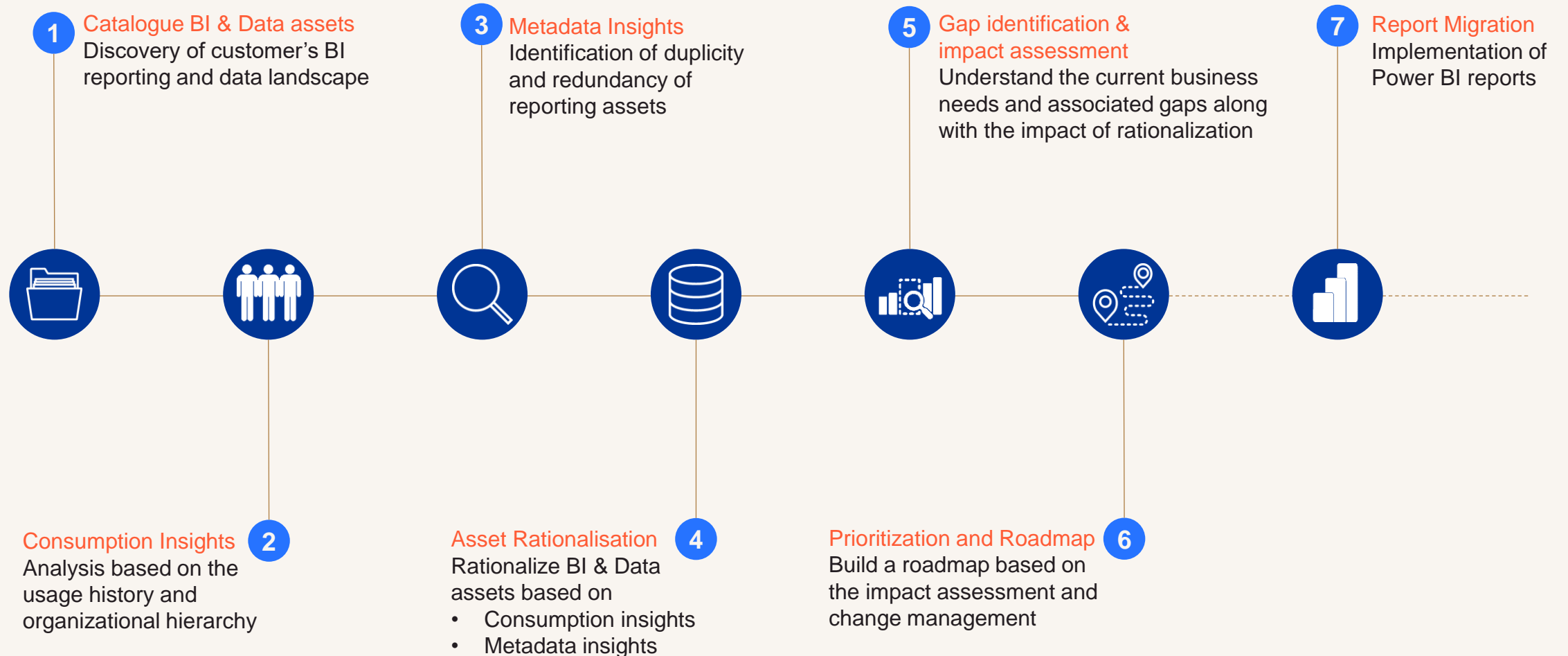**Optimize for Power BI** - tailor the solution to leverage Power BI strengths

Drive User Adoption - ensure the success of the migration effort by encouraging user adoption

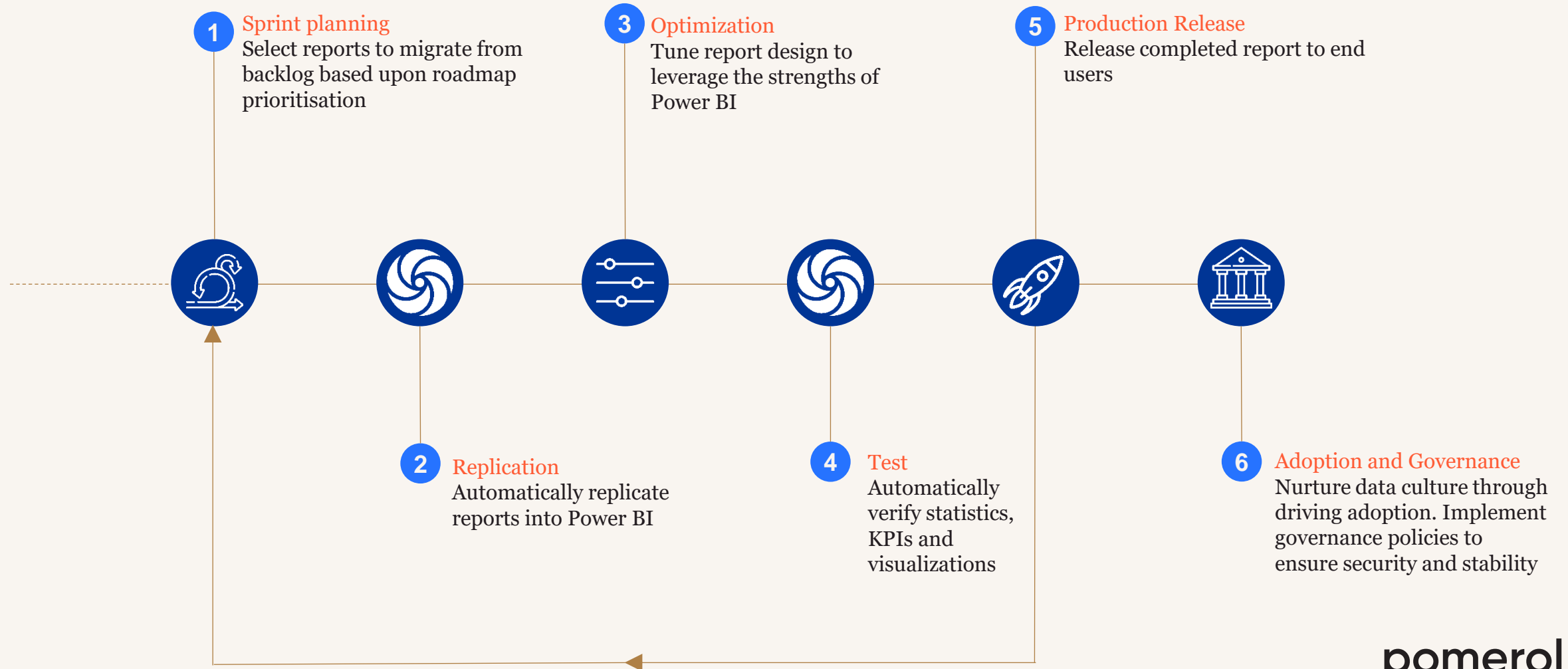**Be Agile** - continuously improve delivery process and adapt to evolving business requirements

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Building a Migration Roadmap

Our process for planning a migration to Power BI

1 Catalogue BI & Data assets
Discovery of customer's BI reporting and data landscape

3 Metadata Insights
Identification of duplicity and redundancy of reporting assets

5 Gap identification & impact assessment
Understand the current business needs and associated gaps along with the impact of rationalization

7 Report Migration
Implementation of Power BI reports

2 Consumption Insights
Analysis based on the usage history and organizational hierarchy

4 Asset Rationalisation
Rationalize BI & Data assets based on
- Consumption insights
- Metadata insights

6 Prioritization and Roadmap
Build a roadmap based on the impact assessment and change management

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Migration Delivery Process

Our process for an accelerated agile migration

1 Sprint planning
Select reports to migrate from backlog based upon roadmap prioritisation

3 Optimization
Tune report design to leverage the strengths of Power BI

5 Production Release
Release completed report to end users

2 Replication
Automatically replicate reports into Power BI

4 Test
Automatically verify statistics, KPIs and visualizations

6 Adoption and Governance
Nurture data culture through driving adoption. Implement governance policies to ensure security and stability
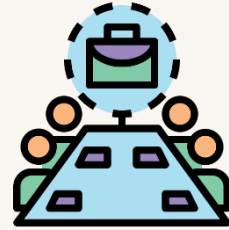
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How We Achieve Power BI Migration Success

Every migration is slightly different. It can depend on the organizational structure, data strategies, data management maturity, and organizational objectives. We have consistently achieved Power BI migration success with our clients.

Executive sponsorship

Identify an executive sponsor early in the process.

Training, support, and communication

Recognize that it's more than just a technology initiative. Any BI or analytics project is also a people initiative, so consider investing early in user training and support.

Quick wins

We prioritize high-value items that have tangible business value and demonstrate the value of the migration immediately.

Modernization and improvements

Be willing to rethink how things have always been done. A migration can provide an opportunity to deliver improvements.
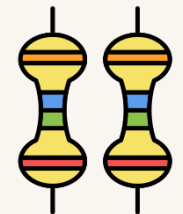
Continual learning

Be prepared to use a phased approach while continually learning and adapting. Work in short, iterative cycles to bring value quickly.

Overcoming resistance to change

Understand there may be varying levels of resistance to change; some users will resist learning a new tool. We are well versed on overcoming these challenges to make your migration successful.

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Legacy Migration Facilitating Modern BI

Tableau to Power BI Migration

This client success story explains how a nationwide LTL ("Less Than Load") trucking company engaged Pomerol Partners to design a framework to facilitate this complex migration, and to design new end-user toolsets using Power BI.

Problem

The challenge is this trucking company being tasked with migrating a significant installation of Tableau based information reporting routines to a more modern and flexible framework, both for ETL and for end-user reporting. Additionally, they are in the early phases of a major cloud infrastructure migration. This multi-migration environment has the potential for the perfect storm and the company needed BI professionals to be able to consult them through it appropriately, as it was outside their scope of expertise.The ability to view the data in different currencies

Solution

Pomerol designed a new set of processes to populate first populate data structures in a newly created data mart (which the client then brings into its data warehouse), with emphasis on data validation to validate data consistency with the legacy processes. Pomerol then worked with the client end-users to design useful and meaningful analytical dashboards using Power BI, while also replicating the existing reporting formats to build comfort for the users. Additionally, Pomerol is working hand-in-hand with Microsoft to ensure all new processes and technical solution can be migrated to Azure with minimal extra lifting when the time is right for that move. Microsoft is also actively engaged to help facilitate that migration

Result

Our client views the initial Proof of Concept of these end to-end mechanisms as a rousing success and is working with Pomerol to scope the migration of all reporting processes currently in production.

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Thank you

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